

Create a User Account

1 Introduction

The Portfolio Analysis and Management System (PAMS) allows Department of Energy (DOE), Office of Science (SC) applicants and awardees to access and manage their submissions and awards in a single system. To create or access PAMS or [Grants.gov](https://grants.gov) submissions (Letters of Intent (LOIs), Pre-Proposals, or Proposals) or to access or request modifications to award information a user must have an external user account.

As a PAMS user you should never have multiple PAMS accounts and you should never share your username or password with other users or allow them to access your account.

The purpose of this document is to provide step-by-step instructions for users to follow to create an external PAMS account.

2 Prerequisites

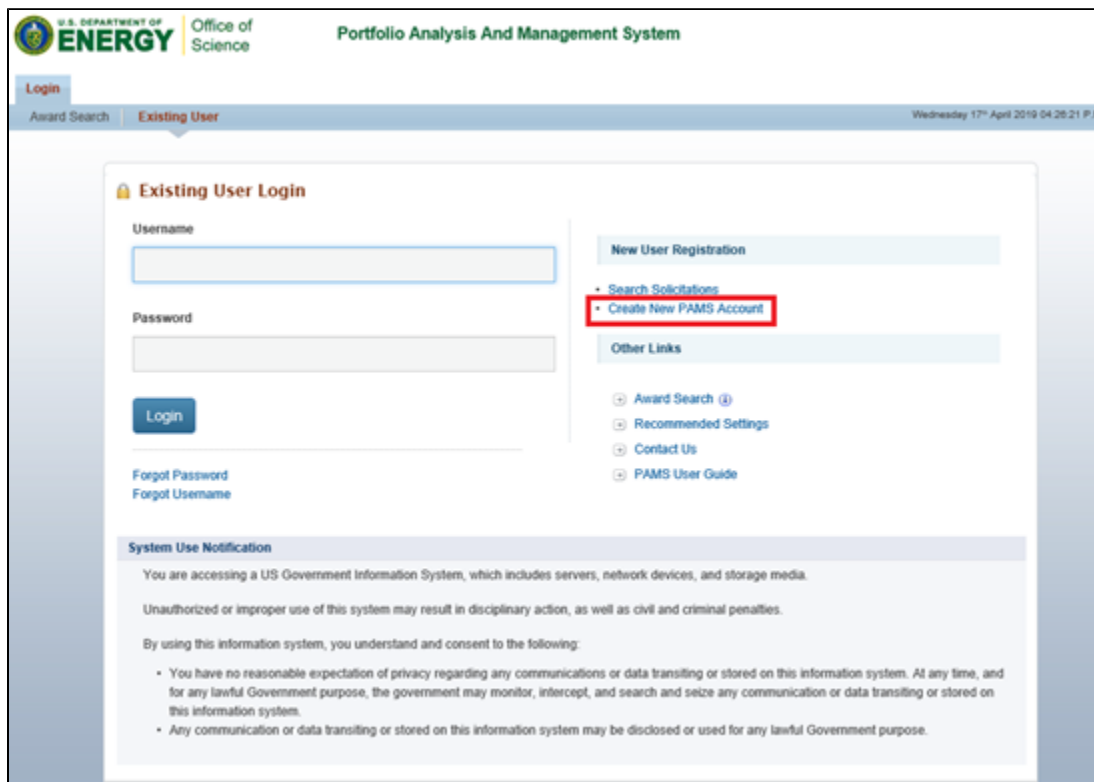
Before a user can create an external PAMS account, the following criteria must be met:

- The user has a valid email address
- The user has access to the PAMS Public website, <https://pamspublic.science.energy.gov/webpamsepxternal/login.aspx>

3 Creating an External Account

Use the following steps to create an external PAMS account.

1. Navigate to the PAMS external homepage at: <https://pamspublic.science.energy.gov/webpamsepxternal/login.aspx>
2. Click the **Create New PAMS Account** link in the navigation menu on the right. (Figure 1)



The screenshot shows the PAMS External Homepage. At the top, there is a header with the U.S. Department of Energy logo, 'Office of Science', and 'Portfolio Analysis And Management System'. Below the header, there is a navigation bar with 'Login', 'Award Search', and 'Existing User' tabs. The 'Existing User' tab is selected. The main content area is titled 'Existing User Login' and contains a 'Username' field, a 'Password' field, and a 'Login' button. To the right of the login fields is a 'New User Registration' section with a red box around the 'Create New PAMS Account' link. Below this is an 'Other Links' section with links to 'Award Search', 'Recommended Settings', 'Contact Us', and 'PAMS User Guide'. At the bottom, there is a 'System Use Notification' section with a disclaimer and consent text.

Figure 1. PAMS External Homepage - Create New PAMS Account



If you received an email inviting you to register to PAMS, follow the instructions in the invitation email.

3. PAMS will load the Having Trouble Logging In? page, which displays a list of seven subsections that provide further guidance for logging into PAMS. Select **No, I have never had an account**. (Figure 2)

Having Trouble Logging In?

Click on the appropriate option below to troubleshoot login issues.

Note(s):
If you have been invited to register to PAMS, please follow the instructions in the invitation email.

Do you have a PAMS account?

- ▶ **No, I have never had an account**
- ▶ No, I have never had an account but I have a registration code.
- ▶ Yes, but I did not complete my registration.
- ▶ Yes, but I forgot my username.
- ▶ Yes, but I forgot my password.
- ▶ Yes, but my account was disabled.
- ▶ Yes, but it was for a different institution. I am here to work for another institution.

Cancel

Figure 2. Having Trouble Logging In? – No, I have never had an account

4. Upon clicking **No, I have never had an account**, PAMS will expand the subheader. Read the section carefully. To create an external account, click **Create an Account**. To cancel account creation, click **Cancel**. (Figure 3)

Do you have a PAMS account?

▼ No, I have never had an account

Create an Account

Registration within PAMS is a two step process:

- Create an individual account for yourself. This account should not be shared with any other user.
- Affiliate the account to your institution record if it already exists and affiliate your account to it. Each account can be associated with one or more institutions.

Cancel Create an Account

Figure 3. Having Trouble Logging In? – No, I have never had an account, Cancel, Create Account

5. Upon clicking **Create an Account**, PAMS will navigate the user to the “Create Account” page. Refer to the table below for guidance on completing the required fields. (Figure 4)

Create Account

Enter required information as shown below. When finished, click Save and Continue.

OMB Number: 1910-5178
Expiration: 03-31-2019

Fields with * are required.

Personal Information

Prefix
(Example: Mr., Ms., Dr.)

None

* First Name

Middle Initial

* Last Name

Suffix
(Example: Jr., Sr., III)

* Username

* Password

Password Instructions

Passwords must be at least eight characters in length and contain the following:

- At least one lowercase letter (a-z)
- At least one uppercase letter (A-Z)
- At least one number (0-9)
- At least one of these five special characters: ~ ! @ # *

 Your new password cannot be identical to any of your previous 6 passwords.
 Passwords expire every 120 days. The system will prompt you to change your expired password when you log in.
 Since this password change is prompted by the system, there will be no email notification with the new password. ([+ View Less](#))

* Retype Password

* Security Question

Select One

* Security Answer

(Security Answer is case sensitive)

* Email

Cancel

Save and Continue

Figure 4. Create Account

Required Fields

Element	Description
<i>First Name</i>	Enter your first name.
<i>Last Name</i>	Enter your last name.
<i>Username</i>	Enter the username you wish to use. (Do not use spaced when creating your username)
<i>Password</i>	Enter a password. Passwords must be at least eight characters in length and contain the following: <ul style="list-style-type: none"> At least one lowercase letter (a-z) At least one uppercase letter (A-Z) At least one number (0-9) At least one of these five special characters: ~ ! @ # * Your new password cannot be identical to any of your previous 6 passwords. Passwords expire every 120 days. The system will prompt you to change your expired password when you log in. Since this password change is prompted by the system, there will be no email notification with the new password.
<i>Retype Password</i>	Retype your password.
<i>Security Question</i>	Select a security question. Should you forget your password at any time, this security question will allow you to obtain a new password.
<i>Security Answer</i>	Provide an answer for the security question.
<i>Email</i>	Enter an email address. This email address must be a unique email and you will not be able to create an account if the email is associated to another PAMS account.

6. Upon completing the required fields, click **Save and Continue** in the bottom right corner of the page. (Figure 4)
7. PAMS will load the Create Account page, the **Personal Information** you provided on the previous page will be populated. Refer to the table below for guidance on completing the remaining required fields. (Figure 5)

Create Account

Enter required information as shown below. When finished, click Create Account.

OMB Number: 1910-5178
Expiration: 03-31-2019

Fields with * are required.

Personal Information

Prefix (Example: Mr., Ms., Dr.)	
First Name	First Name
Middle Initial	
Last Name	Last Name
Suffix (Example: Jr., Sr., III)	

Figure 5. Create Account – Personal Information

8. Enter your **Email Address(es)** and identify the Preferred email, see the table on required fields for more information). (Figure 6)
9. Enter your **Phone Number** and identify the Preferred Phone number, see the table on required fields for more information). (Figure 6)

Contact Information

* Email Address

(username@domain.com) ☒ Preferred

(username@domain.com) ☐ Preferred

(username@domain.com) ☐ Preferred

* Phone Number

Select Type

Work

Cell

Work 2

Other

Ext. ☒ Preferred

Ext. ☐ Preferred

Ext. ☐ Preferred

Fax Number

Website

ORCID ID N/A

Register or Connect your ORCID ID

Figure 6. Create Account – Contact Information

10. Enter your **Mailing Address**, designate if it is the **Address**, **PO Box Only**, or **Rural Route**. (Figure 7)
11. Enter your **City**, **State**, and **Zip Code**. (Figure 7)

Mailing Address (Required)	<p>Enter a mailing address. (Figure 7) To do so, click the radio button to select one of the following:</p> <ul style="list-style-type: none"> Address PO Box Only Rural Route <p>To enter an <i>Address</i>:</p> <ul style="list-style-type: none"> In the Street Number field, enter the number of the street only. Enter the Street Name only, not the number. If applicable, in the Select One dropdown, select one of the following options: APT, BSMT, BLDG, DEPT, FL, FRNT, HNGR, KEY, LBBY, LOT, LOWR, OFC, #, PH, PIER, REAR, RM, SIDE, SLIP, SPC, STOP, STE, TRLR, UNIT, or UPPR. : Enter the Number which corresponds to the item you selected in the dropdown, if applicable. For example, APT 3, BLDG 5A, etc. <p>To enter a <i>PO Box Only</i>:</p> <ul style="list-style-type: none"> Enter the Box Number if you selected PO Box. <p>To enter a <i>Rural Route</i>:</p> <ul style="list-style-type: none"> In the Select One dropdown, select one the following options: Rural Route, Highway Contract Route, US Route, State Route, or Road. Enter the route number, in the Number Field. If applicable, enter the box number in the Box field.
City	<p>Enter the city in which the address is located. (Figure 7)</p> <p>NOTE: This field is only required if the “Zip Code” field is left blank.</p>
State	<p>Use the State dropdown to select the state in which the address is located. (Figure 7)</p> <p>NOTE: This field is only required if the “City” field is completed.</p>
Zip Code	<p>Enter the zip code in which the address is located. If necessary, use the Lookup link to help determine the appropriate zip code of the address. (Figure 7)</p> <p>NOTE: This field is only required if the “City” field is not completed.</p>

☐ Click here to enter physical location address if different from mailing address. (Providing this address is optional.)

Address Type
☒ Domestic Address
☐ International Address
Refresh

Specify Domestic Address

* Address

Street Number
Select One

▼

* Street Name

Number

* City

(Required if Zip is not specified)

Urbanization

(Used only for Puerto Rico(PR))

* State

▼

(Required if City is specified)

* Zip Code (Lookup [?](#))
 -

(Required if City is not specified)

Congressional District


(Example: 01)

Figure 8. Create Account – Physical Address

12. The last section on the Create Account page is for a Physical Address, this is optional. However, if you begin entering information in this sections some fields may be required. You also have the option to enter a Physical International Address in this section as well.

13. Once you have completed the required fields, click **Create Account** in the bottom right corner of the page. (Figure 7)


14. PAMS will navigate you to the Agreement page. Review the Notice to Users, Privacy Notice, and Rules of Behavior carefully. If you agree, click **Accept** in the bottom right corner of the page to proceed. If you disagree, click **Decline** in the bottom left corner of the page. You will not be able to Log into PAMS until you have signed the User Agreement. (Figure 9)


Agreement

Fields with * are required.

OMB Number: 1910-5178

Expiration: 03-31-2019


Note(s):

Please read this information carefully and accept by clicking on the 'Accept' button to proceed. You may decline it by clicking on the 'Decline' button, and you will not be able to log in.

PORTFOLIO ANALYSIS AND MANAGEMENT SYSTEM (PAMS)

NOTICE TO USERS

This is a U.S. Government, Department of Energy (DOE) system and it is for the use of authorized users only. The system is to be used for official Government business pertaining to the inquiring, applying, and managing of proposals and awards. Unauthorized access or use of this system may subject violators to criminal, civil, and/or administrative action. It is protected by various provisions of Title 18, U.S. Code. Violations of Title 18 are subject to criminal prosecution in Federal court.

PRIVACY NOTICE

The system contains personal information protected under the provisions of the Privacy Act of 1974, 5 U.S.C. § 552(a), as amended. Violations of 5 U.S.C. § 552(a) may subject the offender to criminal penalties.

In the event it is suspected that you have not complied with these Rules of Behavior, your account will be frozen, you will be denied any access to the site, and criminal, civil, and/or administrative action may also be taken.

The Privacy Act generally prohibits government agencies from revealing personal information by any means of communication to any person without the prior written consent of the individual about whom the information pertains. DOE will maintain the confidentiality of the information, and will not further disseminate it except as needed for proposal and award administration or as authorized by 5 U.S.C. § 552(a)(b).


Section 641 of the Department of Energy Organization Act, codified at 42 U.S.C. § 7251, authorizes the DOE to collect, use, and retain information that is mandatory for the financial awards process. All information comes from proposals, reviews, and reports that are submitted to the DOE by authorized external users (i.e., scientists and research administrators). Grant applications, contract proposals, technical reviews by peer reviewer, records of grant and contract awards, financial data, and any other pertinent information needed for the tracking or approval of a grant or contract is maintained to track and monitor the receipt, review, and disposition of grant applications and contract proposals from universities, non-profit organizations, large and small businesses, other Federal agencies, State and local governments, individuals, and DOE national laboratories seeking Federal financial support for research projects, training, and related activities. The system also tracks and monitors funding authorizations and associated financial data. A record from this system may be disclosed as a routine use to expert peer reviewers selected by the DOE Office of Science for their expertise in specific research areas to evaluate the proposal in accordance with established evaluation criteria. A record also may be disclosed as a routine use to a Principal Investigator, Sponsored Programs Office, Business Office, or similar element, via electronic media for the purpose of checking the status of its proposals that have been submitted to DOE for support.

This system is an interactive, web-based application that enforces edits and business rules that check for data completeness; therefore, individuals generally don't get a choice to opt out of providing information necessary to the financial awards process. Failure to provide required documents such as preproposals, interagency proposals, DOE national laboratory proposals, reports, or minimal required registration information (e.g., name, contact information) can negatively affect eligibility for awards.

Reports about people, institutions, awards, and proposals can be produced for internal DOE use, e.g., evaluating and selecting applicants, determining funding for projects, and tracking awards and proposals. Only DOE employees and contractors who have a need to know based on their job responsibilities have access to these reports. Persons who are provided information in PAMS are subject to the same statutory criteria applicable to DOE employees under the Privacy Act.

Figure 9. Agreement

15. Upon accepting the User Agreement you will be navigated back to the Login page where you can enter your new created **Username** and **Password** and click **Login** to proceed into PAMS. (Figure 10)

 Existing User Login

Username

Password

Login

[Forgot Password](#)

[Forgot Username](#)

New User Registration

- [Search Solicitations](#)
- [Create New PAMS Account](#)

Other Links

- [Award Search](#) ⓘ
- [Recommended Settings](#)
- [Contact Us](#)
- [PAMS User Guide](#)

System Use Notification

You are accessing a US Government Information System, which includes servers, network devices, and storage media.

Unauthorized or improper use of this system may result in disciplinary action, as well as civil and criminal penalties.

By using this information system, you understand and consent to the following:

- You have no reasonable expectation of privacy regarding any communications or data transiting or stored on this information system. At any time, and for any lawful Government purpose, the government may monitor, intercept, and search and seize any communication or data transiting or stored on this information system.
- Any communication or data transiting or stored on this information system may be disclosed or used for any lawful Government purpose.

Figure 10. PAMS Login Page